

How to Add Another County's/State Adoption Service Types to a Home Provider Record

NOTE: When you receive a request to add service types to a home provider record you are responsible for maintaining please be sure that your county is the agency that licenses the provider.

- If a parent agency, such as PATH, LSS, Community Care Resources, etc., licenses the home provider then it will be necessary for Jenny Weber at Maximus to update the home provider record for you. Please contact Jenny at WeberJM@dhfs.state.wi.us if such updates are necessary.
 - If another county licenses the home provider, it will be necessary for the designated county contact in the other county to make the updates for you. A complete listing of the designated county provider contacts can be found on the WiSACWIS Knowledge Center web site in the Help Desk section. The link to the WiSACWIS Knowledge Center is: http://apps3.dhfs.state.wi.us/wisacwis/knowledge_web/index.htm
1. Click on your Provider Tab. This will display all of the providers that are currently assigned to you. If you do not see the provider who needs to be re-licensed on your Provider Tab, please create an assignment for yourself or ask your supervisor to assign you to the appropriate provider record.
 2. Double click on the provider's record. This will expand the icons listed under the provider record.
 3. Double click on the License Icon (yellow rubber stamp). This will display all of the licensing work already completed or pending for this provider.
 - **If there is an Active-Regular license for the provider** it will be necessary to close the Active-Regular license before proceeding with the re-licensing to add additional county or State service types. Double click on the Active-Regular license. This will open the Home Provider License window. Click on the options Button and select the option of Additional Licensing Actions. This will open the Additional Licensing Actions pop-up window. In the Action field select the value of "Close". In the Effective From field enter the same exact date that the license was originally created from. To see this date it may be necessary to move the Additional License Action pop-up window up by clicking on the blue header for that window and dragging it upwards. This will allow you to see the Effective From date on the Home Provider License Window. In the Actions field enter the value of "Activate Additional Service Types". Next, click the Approval Button on the Additional Licensing Actions pop-up window and Approve your work. Then, click OK on the Additional Licensing Action pop-up window. This will return you to the Home provider License window. Click OK on the Home Provider License Window. This will return you to the Provider Tab. Continue with Step #4.
 - **If there is a Pending license for the provider** double click on the pending license row. This will open the pending Home Provider License window. Double check that the licensing information on the Services Tab is accurate (ages

accepted, genders accepted, licensing capacities). If these are inaccurate, click the OK Button to exit the Pending License window and complete the steps in #4. Once the licensing information is accurate, return to the pending license by double clicking on the pending license row again. Skip to Step #6.

- **If there are no previous licenses for the provider or there is a Closed or Expired license for the provider** continue with Step #4.

4. It may be helpful to double-check that the provider has the correct licensing information on record in the system. To check the ages accepted, gender accepted and capacities for the home it is necessary to right click on the provider record and select the option of Provider Maintenance. This will open the Home Provider window. Review the licensing information on the Services Tab. If any changes are necessary please make them here as this information pre-fills onto the Home Provider License window and cannot be corrected elsewhere. Once all information is accurate, click the OK Button to save your work and return back to the Provider Tab.
5. To begin the re-licensing process, click on Create> Provider Work or the Provider Work hot button in the menu of the application. This will open the Create Provider Work window. In the Subject box select "License". In the Item box select "Create License" and in the Provider box select the name of the provider you are re-licensing. Click the Create Button. This will open the Home Provider License window.
6. On the Basic Tab of the Home Provider License window it is necessary to enter the appropriate dates in the Effective From, Effective To and Date Completed Application Received fields. The Effective From field should be either the true beginning date of the license or the date following the date of the last license closure. For example, if you had to complete the steps above in #3 for closing an Active-Regular license you will not be able to enter the true begin date for the license in the system. If you just closed the license with a closure date of January 15, 2003 this new license will need to be effective from January 16, 2003 forward. This is because the system does not allow overlapping licensing dates. Once the dates are entered in these 3 fields, click on the Services Tab.
7. On the Services Tab, click on the Add Services Button. This will open the Add Services pop-up window. **NOTE:** It is very important to hold down the CONTROL BUTTON on your keyboard before and during the process of selecting the various counties/State options. While holding down the Control Button on your keyboard scroll through the list and add all of the various counties/State that are going to have active service types on this provider record. Once you have selected all of the appropriate counties/State then click the OK Button on the Add Services pop-up window. This will return you to the service Tab of the Home Provider License. In the Licensed Services Group Box in the lower portion of the Services Tab you should see service types for all of the counties/State you selected in the Add Services pop-up window. It will be necessary to scroll to see all of the service types. If you notice you are missing any of the counties/State service types from the list it will be necessary to repeat the steps for selecting counties/State for the Add Services pop-up window outlined above.
8. Scroll through the list of service types in the Licensed Services Group Box in the lower portion of the Services Tab. Add the appropriate capacities to any new service type by entering a number in the Capacity field to the far right of the service type you

want to activate. The system should already have pre-filled service type capacities for any service type that was previously active for this provider. However, double check that all capacities are correct by scrolling through the entire list of service types.

9. Click on the Basic Tab. In the Assessment Decision Group Box in the lower left-hand corner of the window select the Approve radio button.
10. Next, click the Approval Button on the right hand side of the Home Provider License window and approve your work. Click the OK Button to save your work. This will return you to your Provider Tab. Click View> Refresh to refresh the provider work on your Providers Tab.
11. Check that the re-licensing was done correctly by double clicking on the name of the provider to expand the icons under their name and then double click on the Services Icon under the provider record. All county/State service types that are active for the provider should show as active under this icon. Next, double click on the Licensing Icon to see that the provider has an Active-Regular license. If the license still shows as Pending, the approval process was not done correctly on this license. Double click on the pending license and be sure you have appropriately approved your work. If the service types under the Services Icon do not show as active either the license is not approved correctly or it is possible you did not enter a capacity for that service type.
12. Once you have re-licensed the provider to add the additional county/State service types to the provider record please be sure to notify the worker who made the request so they can document their placement with this provider.